The Department Management Dashboard



Welcome to the Department Management Dashboard

The purpose of the new FDM: Department Management dashboard is to consolidate 4 existing dashboards which will give users one place to access common financial reports in one dashboard. The dashboards that are being combined are:

FDM: Academic Admin FDM: Department Admin

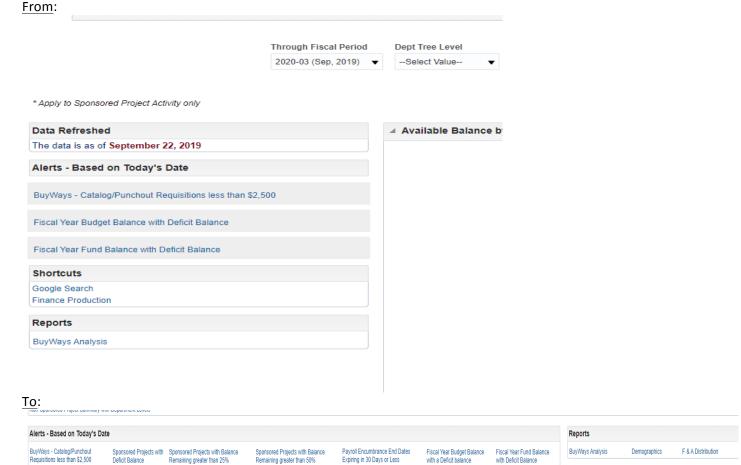
FDM: PI

FDM: Transaction Detail Analysis

Changes from existing dashboards:

Summary Page

Alerts and Reports that were previously shown on the left hand side of the Summary page are now at the bottom of the page to maximize space for the essential reports.



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The order of the Summary reports have been changed to the following

- Fiscal Year Budget Balance Summary
- Fiscal Year Fund Balance Summary
- Sponsored Project Summary
- Non- Sponsored Project Summary

Sponsored specific prompts have been removed from the main dashboard prompt and placed directly above the Sponsored Project reports. A Project Status prompt has been added which eliminates the need for separate links to an "All Project" report and an "Inactive Projects" report.



Non-Sponsored specific prompts have been added directly above the Non-Sponsored Project reports. A Project Status prompt has been added which eliminates the need for separate links to an "All Project" report and an "Inactive Projects" report.



Activity Pages

The new dashboard is utilizing subpages which allows one main page to have many subpages. The activity pages (Budget Balance, Fund Balance, Non-Sponsored and Sponsored) have been moved to subpages of the Activity page.



The Subpages can be reached by clicking a Fund or Project from the Summary page or by clicking the Activity page and then one of the subpages. Each of the subpages consist of a Revenue/Expense Summary and detail reports. The detail reports have been changed to a 'select' menu so that the reports will only run when users want to view them.





Detail	Reports
	Select Reports
	Payroll Detail by Employee
	□ Procurement Summary - Open PO Lines
	□ Voucher Detail
	Procard Detail
	☐ Travel & Expense Detail

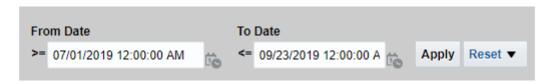
The Budget Balance Activity, Fund Balance Activity, and Non-Sponsored Activity pages include an option to switch the Revenue/Expense Summary report from the standard/default account view to the UM-Plan account view. (UM-Plan is the University Budgeting tool.) The Sponsored Activity page is not affected by the UM-Plan account view.



Sponsored Activity

The Sponsored activity page has been updated to use a 'From Date' and 'To Date' prompt rather than the 'Through Fiscal Period' that is on the other pages. This new feature allows users to input the start and end dates of a project or an award or any other period desired. The data returned is based on the transactions accounting date.

tivity Sponsored Activity



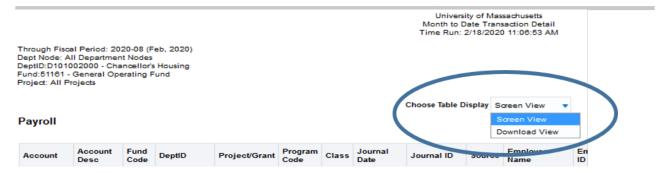
Additional prompting values were also added based on feedback from the Grant Accounting core team.

Drill Reports (i.e. drilling into amounts on Summary pages or Activity pages)

New functionality has been added to the drill reports to provide two views, 'Screen View' and 'Download View'. The 'Screen View' separates each section by the expense type and the 'Download View' has all data in one view with all columns and rows. The 'Download View' is best when users are downloading data into excel for other purposes. The 'Download View' eliminates the need to reformat the excel spreadsheet to put the columns in the same order.

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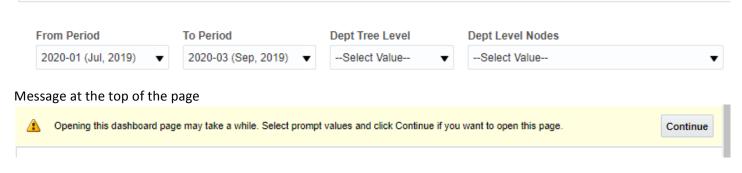




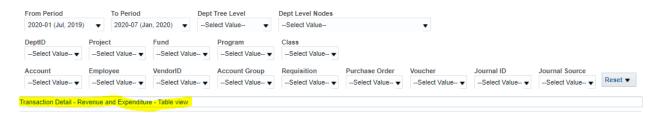
Transaction Detail

The transaction detail analysis dashboard has been incorporated directly into the Department Management dashboard in order for users to have one dashboard to go to. The transaction detail analysis dashboard pages (Revenue and Expenditure, Revenue, Encumbrance, Budget and Balance Sheet) are now subpages of the Transaction Detail page.

The date prompts ('From' and 'To' periods) will initially default to the Current Fiscal Year and the reports will not run until prompts have been selected/updated and the 'continue' button clicked or the 'continue' button clicked. Deferring the generating of the reports until prompts are entered and the 'continue' button clicked will help performance as users will not have to wait for the page to load before selecting/updating the prompts.



The transaction detail includes separate sections for different types of transactions. If a user wants to download the transaction detail to excel, select the table view which is located just below the prompts. The table view allows users to download the multiple sections with different column headings and eliminates the need to reformat the excel spreadsheet to put the columns in the same order.



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Breadcrumbs

When navigating in Summit, use the breadcrumbs at the bottom of the page to return to a previous page. Do not use the back arrow and do not navigate back by directly selecting a tab/page as doing so will carry prompts back. Using the breadcrumbs results in the page displaying exactly as it was.

